

**USER'S MANUAL
FOR THE
PREVENTION ADMINISTRATION
TRACKING SYSTEM
(PATS)**

VERSION 3.0



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Introduction:

The PATS project is designed to collect detail data regarding both the planning and delivery of prevention services/programs in the State of Utah. In addition, PATS serves as a means to help both the local prevention worker and the State Division better manage the preparation for and implementation of substance abuse prevention services and activities by providing useful and meaningful information about the populations, risk/protective factors, and other community data which they address.

In order to help the Local Authority Users of PATS understand how to utilize the software, this user's manual has been separated into seven sections of information.

Section I contains the set of policies and procedures which control the use of the software.

Section II presents information about how data in PATS's database is secured and protected such that a given user can only access the information they are privileged to see.

Section III contains a data flow diagram that represents how data flows from the Prevention Coordinator Area Plan Information (PCAPI) Application and PATS.

Section IV presents the general steps a user should go through, at a high level, to enter data in PATS.

Section V contains a brief overview of the business rules which govern the software.

Section VI contains an overview of the general command buttons, such as save, cancel, return, etc., and how they are utilized.

Section VII contains step by step instructions for completing data entry in PATS under several five different scenarios.

Section I: Policies and Procedures

[A] Data Submission

Each Local Authority is required to submit the data regarding the delivery of their prevention services no later than thirty days after the service begins. Likewise, the data entry for each session of the service must be completed thirty days after it is delivered.

Prevention Coordinators have the ability to indicate, in PCAPI, which fiscal quarter(s) a given service they anticipate it will be delivered within. The fiscal quarters are:

Quarter One	July 1 through September 30
Quarter Two	October 1 through December 31
Quarter Three	January 1 through March 31
Quarter Four	April 1 through June 30

The data entered into PATS is saved and stored on a real time basis. As a result, the moment a piece of information is saved in PATS it can be instantly seen in the system and/or in a report. Since PATS is a “real time” system, the Division of Substance & Mental Health recommends that the user simply go about performing their data entry on a regular daily, weekly, or monthly routine with consideration of the thirty day data entry dead line. If the data is entered on a reasonable, consistent schedule as described above, then the user and their Local Authority agency need not feel concerned about satisfying the dead line because compliance with it is built into such a schedule by default.

[B] Issue Ticket

In order to serve PATS users with a formal process for documenting problems and questions which arise with use of the software, the Division has created a procedure for addressing such items. Each user who experiences a problem, raises an issue, or has a question regarding the use of PATS must submit an "Issue Ticket" to the Division of Substance Abuse which details what the problem, issue, or question is.

The process for submitting the ticket is described below.

[1] The user must go to the Division's website and navigate to the page which contains the hyperlinks for PATS (http://www.hsdsa.utah.gov/DSA_Web_Links.htm)

[2] After navigating to the Web Page, the user must click on the "PATS Issue Ticket Form" hyperlink.

[3] After the form has loaded, the user must fill in:

- a. The user's name **(required)**
- b. The user's Local Authority agency **(required)**
- c. The user's telephone number **(required)**
- d. The description of the problem or issue **(required)**
- e. If an error occurred, then the error message must be included on the form **(required when an error is involved)**
- f. Add any other pertinent information

[4] When the form is completely filled out, the user must click on the "Submit" button located at the bottom of the form.

[5] After the Issue Ticket has been submitted, the Division will address the ticket with five working days of receiving it.

[C] Accessing PATS & Its Reports

Accessing PATS

PATS should **ONLY** be accessed through the Division's website. The URL for PATS is subject to change by forces outside of the Division's control. Consequently, the Division created a Web Page in its site which contains a hyperlink to PATS (http://www.hsdas.utah.gov/DSA_Web_Links.htm). The user is welcome to bookmark the Web Page. However, they should **NOT** bookmark the software URL because when it changes the bookmark will not automatically point to the new URL.

The communication between the user's computer and PATS is digitally encrypted in order to protect the communication link from being hacked into from someone outside of State government. Even so, the probability that someone can somehow circumvent the digital security can increase if the communication link is left open indefinitely. Consequently, the PATS software will "Time Out" if it is not used for more than 30 minutes. If the "Time Out" function is engaged, then the software will abort the user's current session. Aborting the session means that the user will have to log into PATS again before they can use the software.

PATS Reports

The PATS Reports for a given Local Authority are accessible by going to the following link: http://www.hsdas.utah.gov/DSA_Web_Links.htm

After the browser has arrived at the URL above, click on the link labeled: [**PATS, Year End, Alcohol Server Reports**](#)

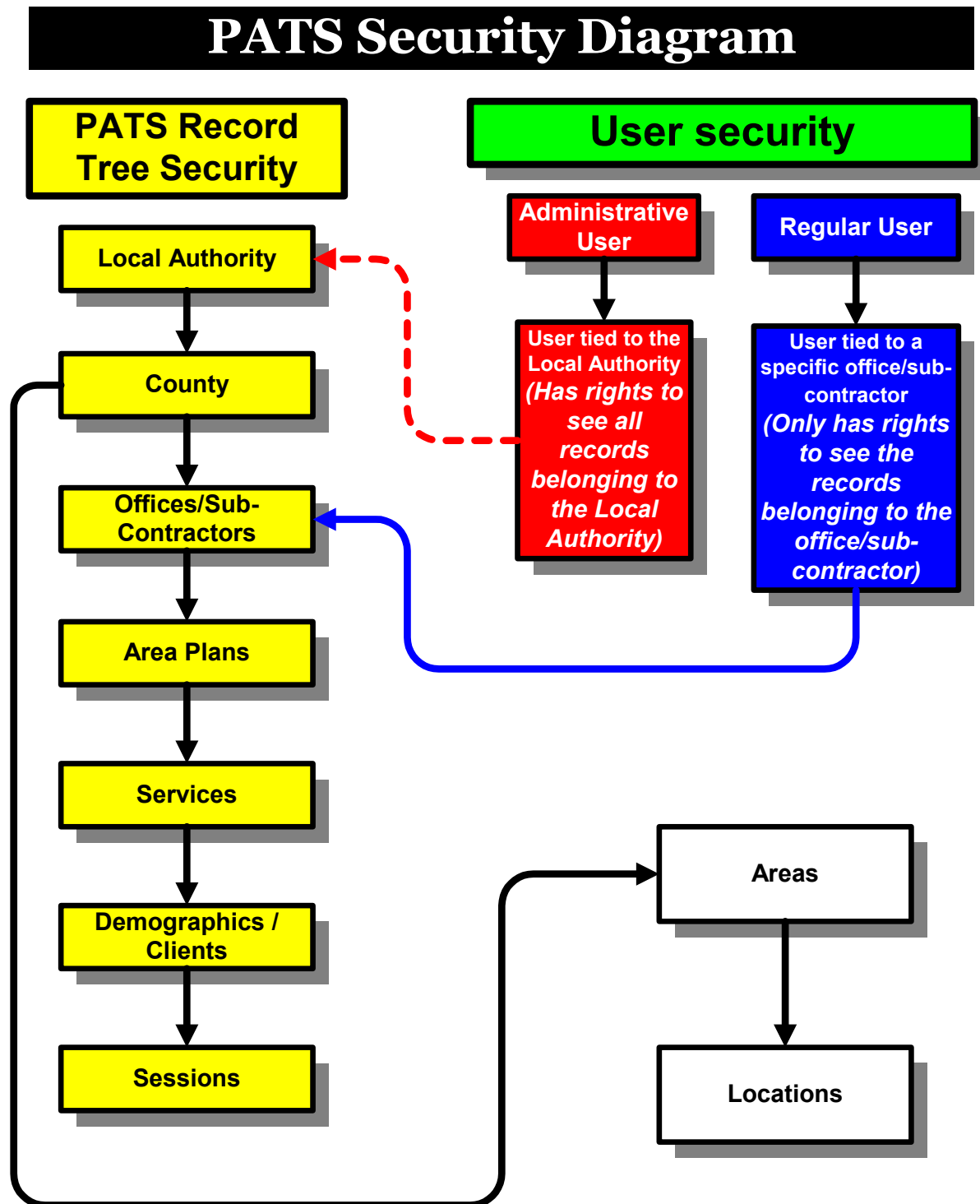
The next page that will appear in the browser contains a list of the Local Authorities. Each Local Authority hyperlink is protected by login security. Consequently, the user must have a valid user ID and password which has rights to see the reports for a given Local Authority before they can progress onto the web page which contains the links for the reports.

[D] User Security

In accordance with The Utah State Department of Human Service's security policy, each time a user adds or modifies a record within PATS, the user's ID will be added to the given record when it is newly saved or updated along with the date the transaction takes place. The practice of recording the User's ID serves the purpose of making each user accountable and responsible for the information they manage, add, modify, etc., in PATS. As a result of the policy, each user of PATS can not, under any circumstances, reveal their user ID and password to any individual other than State staff who work in the Department of Human Services or the Division of Information Technology Services (ITS).

If a user does reveal their ID and password to another individual who then uses it to gain access to PATS illegitimately, then the owner of the ID is responsible and liable for any transactions that are made in the software and its database for good or bad because their ID will be stored in the database along with the affected data.

Section II: PATS Data Security



[Figure 1]

PATS Security Documentation:

PATS security is designed with two levels of user access that controls what an individual user can see. One user type is **Administrative**. The other user type is **Regular**. Administrative users can see all of the data that belongs to the Local Authority they are assigned to. The Regular user can only see the data that belongs to the office(s) he/she is assigned to. Hence, depending upon what designation a specific user is given by DSAMH staff (i.e. Administrative or Regular), the user will be restricted in regard to what they can and cannot see.

1. Administrative Users

As Figure 1 depicts, an Administrative user is assigned to a Local Authority. Typically, the Prevention Coordinator is assigned as an Administrative User. The assignment dictates that the Prevention Coordinator can see all of the counties, offices/sub-contractors, Area Plans, Services, Demographics/Clients, and Sessions that are entered in PATS for the specific Local Authority the Coordinator works for.

2. Regular Users

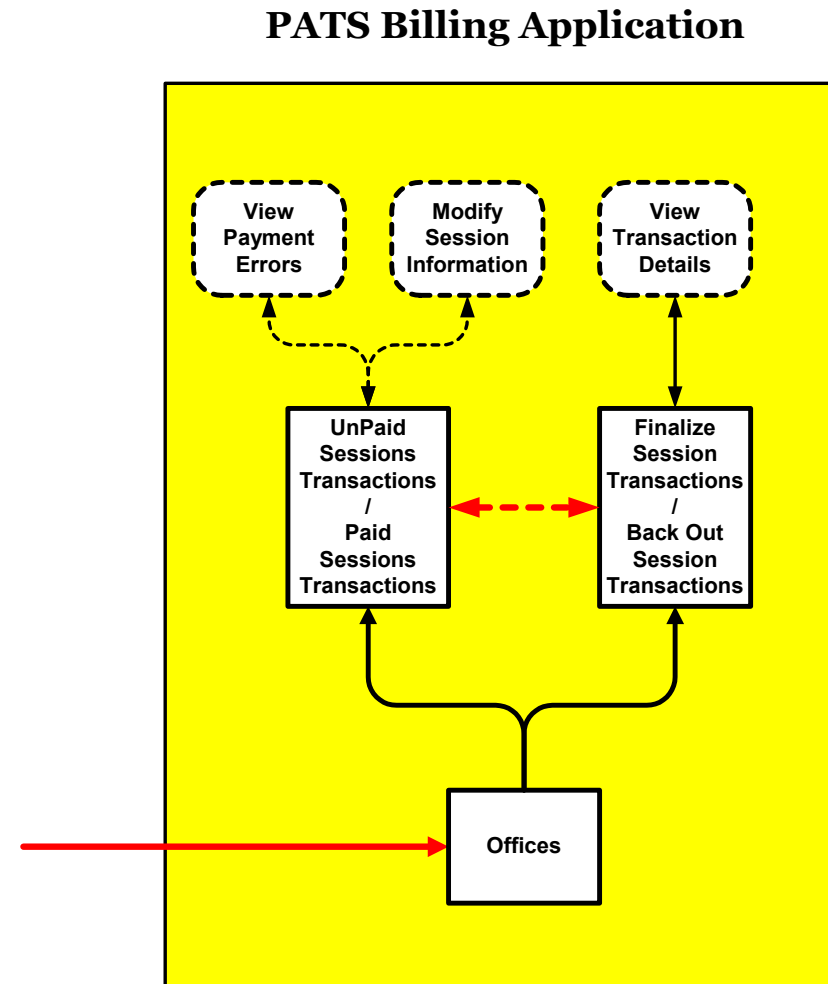
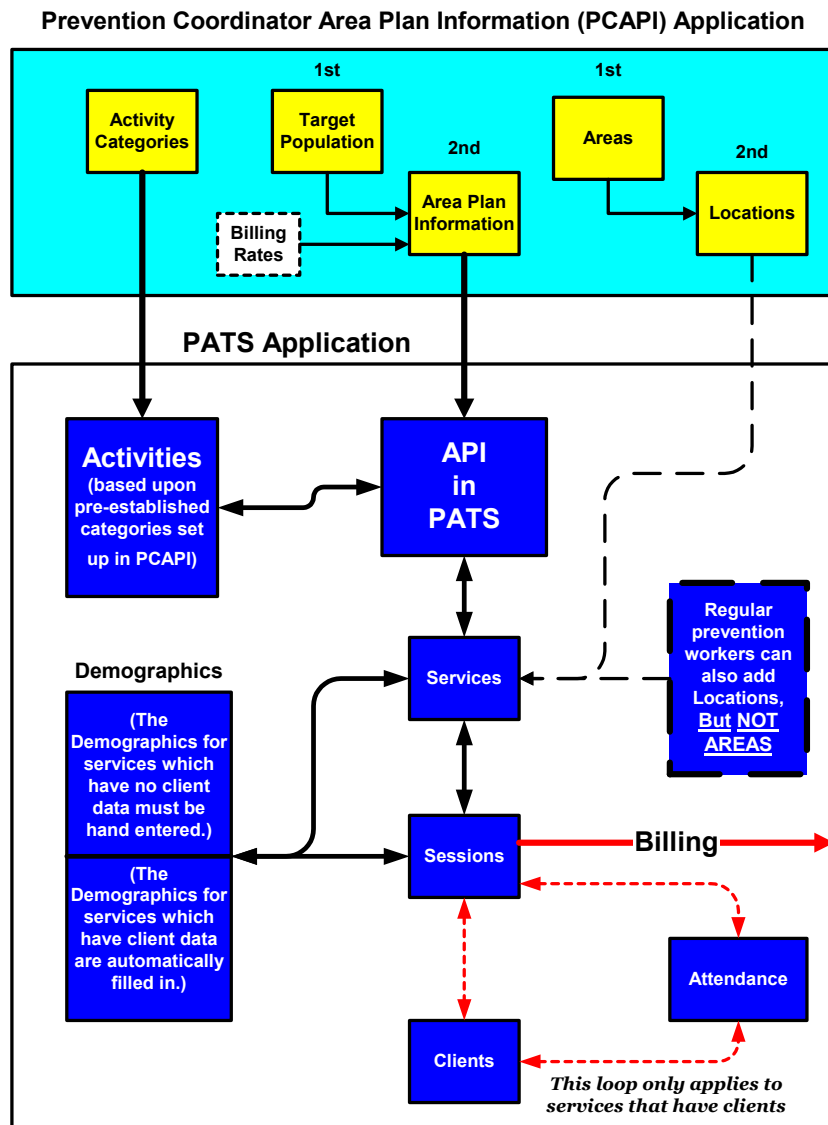
As Figure 1 depicts, a Regular user is assigned to a specific Office/Sub-contractor. Typically, the regular prevention worker is assigned as a Regular User. The assignment dictates that the prevention worker can **only** see the Area Plans, Services, Demographics/Clients, and Sessions that are entered in PATS for the specific Office(s)/Sub-contractor(s) the user is assigned to.

3. Areas & Locations

Areas are generalized regions within a county where prevention services are delivered (i.e. a city, a neighborhood, a school district, etc.). Locations represent specific coordinates where the service is delivered (i.e. the Washington Library, Tintic Elementary School, the Beaver Office, etc.).

Areas are assigned to a county. Locations are assigned to an Area. Consequently, a user can only see the areas and locations which are assigned to the county(ies), and subsequently the office(s)/sub-contractor(s), he/she is attached to. In addition, if two or more offices/sub-contractors exist within the same county, the user(s) assigned to them can see all of the Areas and Locations associated with the county because Offices/Sub-contractors are tied to a county just as Areas/Locations are. However, even though PATS allows a user from one Office to see the locations created for another Office which resides in the same county, it **does not** allow him/her to see the other Office's Area Plans, Services, Demographics/Clients, and Sessions (see Figure 1). Hence, the security described for Regular Users remains intact even though a user can see all of the Locations entered for the county. As a result, Areas and Locations have no bearing on or relevance in determining what Area Plans, Services, etc., a Regular User can see.

Section III: PATS & PCAPI Data Flow Diagram



[Diagram 1]

Diagram 1 shows that the PATS software actually consists of three major parts. PCAPI, PATS, and PATS Billing. The following discusses how all three applications work together.

1. PCAPI:

- PACPI is used by the Prevention Coordinators to create/set up the data regarding Area Plan prevention programs, Areas, Locations, Target Populations, and Activities. The data entered into PCAPI flows into PATS such that the regular PATS user does not have to reenter the information (i.e., once the risk/protective factors, billing information, descriptions, domains, etc., are entered in PCAPI for a prevention program, the regular PATS user does not have to reenter all of that information).

2. PATS:

- PATS is used to collect data about the planning/preparation for and delivery of prevention services. On the delivery side of PATS, three major kinds of data are collected. They are: selecting a prevention program previously set up in PCAPI, entering the demographic or client data on the people served, and entering sessions. On the activity (planning/preparation) side of PATS, the details of the specific planning/preparation effort is collected.

3. PATS Billing:

- PATS Billing is used to process the billing which is applied to a specific session of prevention service.

Section IV – PATS Data Entry Process

Service Information Add New Location

<< < > >> [Save](#) [Undo](#) [Delete](#) [Insert](#) [Maintain Clients](#) [Sessions](#) [Demographics](#) [Return](#) [Cancel](#)

API Service Name	Adult DUI Education	Location	Deaver Senior High
Other Description	Adult DUI Education	Target Pop Name	Elementary Age Youth
Community	<input checked="" type="checkbox"/>	Comments	
Family	<input type="checkbox"/>		
Peer	<input type="checkbox"/>		
School	<input type="checkbox"/>		
IOM Class	Indicated Services	Multiple Sessions	true
Complete	<input type="checkbox"/>	Clients	false
Start Date *	03/05/2002	Fiscal Quarter	3
Units Given		Fiscal Year	2002
Planned Hours			

Risk **Protective**

Risk Code	Risk Factor
No records found!	

<< < > >> [Delete](#) [Insert](#) From 0 to 1 Total: 0

1



2

Demographics

API Service Name	Adult DUI Education	0 to 4	<input type="text" value="0"/>	Males	<input type="text" value="0"/>	White	<input type="text" value="0"/>
Other Description	Adult DUI Education	5 to 11	<input type="text" value="0"/>	Females	<input type="text" value="0"/>	Black	<input type="text" value="0"/>
Start Date	03/05/2002	12 to 14	<input type="text" value="0"/>	Total Gender	0	Hispanic	<input type="text" value="0"/>
General Count	<input type="text" value="0"/>	15 to 17	<input type="text" value="0"/>			Islander/Asian	<input type="text" value="0"/>
Total Count	0	18 to 20	<input type="text" value="0"/>			Native American	<input type="text" value="0"/>
		21 to 24	<input type="text" value="0"/>			Multiple Race	<input type="text" value="0"/>
		25 to 44	<input type="text" value="0"/>			Other	<input type="text" value="0"/>
		45 to 64	<input type="text" value="0"/>			Total Race	0
		65 and Over	<input type="text" value="0"/>				
		Total Age	0				

[OK](#) [Cancel](#)

3



Session Maintenance

<< < > >> [Save](#) [Undo](#) [Delete](#) [Insert](#) [Attendance](#) [Demographics](#) [Clients](#)

Date of Session *

Total Demographics 0

Attended

Hours

Units

Comments

[Figure 1]

The process for entering data in PATS generally consists of three-steps. They are:

- [1] creating a Service.
- [2] creating general Demographic or Client specific data.
- [3] creating Sessions.

Regardless of the kind of service that is entered into PATS, the user should follow each step.

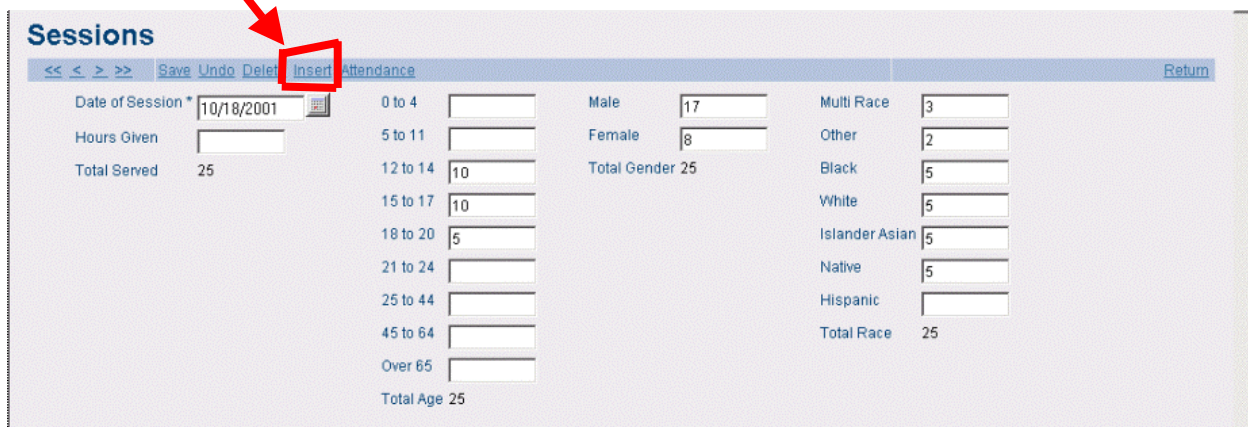
As Section III in this document describes, data flows from the PCAPI application into PATS for the purpose of reducing and simplifying the data entry that a PATS user must do for a given Service. One significant type of data that flows from PCAPI is the designation that the Service will either require Demographic or Client specific data (please see **Section VI: Subsection G** in the *PCAPI User Manual*.) If the Service is marked as requiring demographic data, then Step 2 in Figure 1 above is addressed by simply filling in the demographic data (please see **Section VII – Subsections A or C** in the *PATS User's Manual*). However, if the Service is marked as requiring client specific data, then Step 2 in Figure 1 above is addressed by creating a client roster (please see **Section VII – Subsection B** in the *PATS User's Manual*). In addition, if client data is required, the session attendance will be collected from the “attendance” that is marked for each session from the client roster (please see **Section VII – Subsection B** in the *PATS User's Manual*).

Section V: PATS Business Rules

- When changing an API you now get a warning message about how this change could affect the Services associated to the API.
- If the API was flagged as having clients and you change it to not have clients the system will remove the clients, any attendance records and clear out the demographic records for all the Services associated to the API..
- If the API was flagged as not have clients and you change it to have clients the system will clear out the demographic records for any Services associated to the API.
- When entering a Session, the start date can not be in the future.
- If the Service is flagged as not have multiple Sessions, then you can not enter more that one Session for that Service.
- If the Service is flagged as having clients, the system will determine the demographic numbers from the clients entered into the system.
- If the Service is flagged as having clients, the system will determine the attended number from the attendance take for each Session.
- If the Service is flagged as not having clients, the demographic and attended fields will be open for the user to enter any number they determine is correct.
- Activities were added to the system.
- Area Info – The fiscal year must be between 2001 and 2050.
- Area Info – You must select a domain.
- Clients – You must enter an age or birth date.
- Service Demographics – The total of Age, Gender and Race must match.
- Service – Must select a domain.
- Session – Attended can not be more that the total demographic count.
- Session – If the service is not flagged as multiple, then you can not add more than one.
- Session – You can not enter a future date for the Session.
- User/Provider – You must be an Administrator to be assigned to a Provider.
- User/Office – You must not be an Administrator to be assigned to an Office.

Section VI: Do's And Don'ts

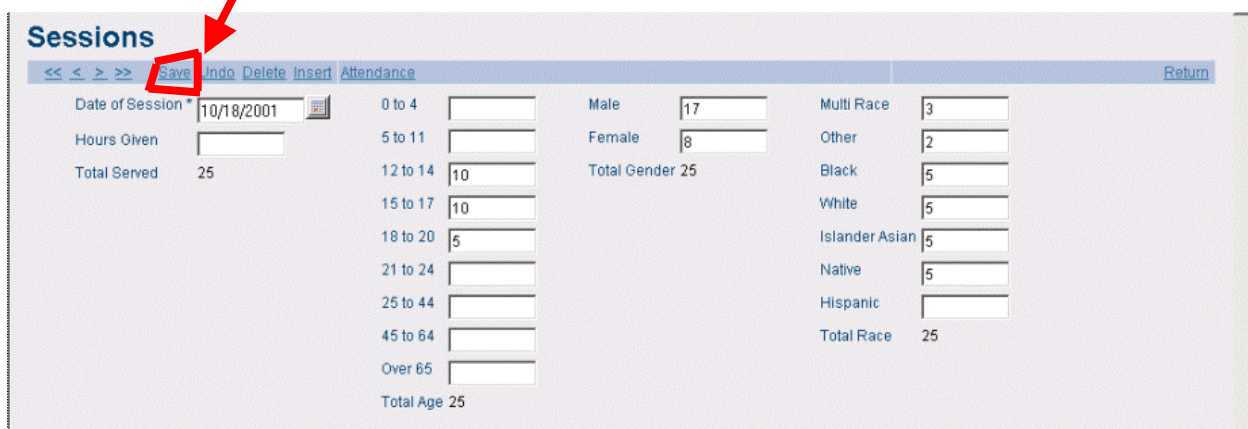
1. Do use the **INSERT** button in order to type data in fields on the screen.



The screenshot shows the 'Sessions' form with a menu bar containing '<< < > >> Save Undo Delete Insert Attendance Return'. The 'Insert' button is highlighted with a red box and a red arrow. The form contains several input fields for session data.

Date of Session *	0 to 4	Male	Multi Race
10/18/2001		17	3
Hours Given	5 to 11	Female	Other
		8	2
Total Served	12 to 14	Total Gender	Black
25	10	25	5
	15 to 17		White
	10		5
	18 to 20		Islander Asian
	5		5
	21 to 24		Native
			5
	25 to 44		Hispanic
	45 to 64		Total Race
			25
	Over 65		
	Total Age		
	25		

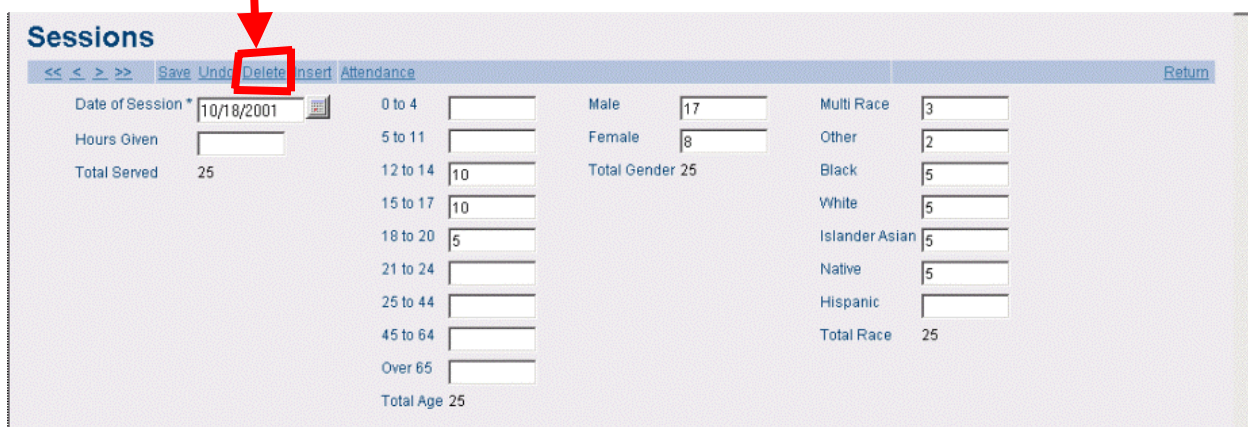
2. Do use the **SAVE** button to save the data entered on the screen.



The screenshot shows the 'Sessions' form with a menu bar containing '<< < > >> Save Undo Delete Insert Attendance Return'. The 'Save' button is highlighted with a red box and a red arrow. The form contains several input fields for session data.

Date of Session *	0 to 4	Male	Multi Race
10/18/2001		17	3
Hours Given	5 to 11	Female	Other
		8	2
Total Served	12 to 14	Total Gender	Black
25	10	25	5
	15 to 17		White
	10		5
	18 to 20		Islander Asian
	5		5
	21 to 24		Native
			5
	25 to 44		Hispanic
	45 to 64		Total Race
			25
	Over 65		
	Total Age		
	25		

3. Do use the **DELETE** button to remove data previously saved in the database.



The screenshot shows the 'Sessions' form with a menu bar containing '<< < > >> Save Undo Delete Insert Attendance Return'. The 'Delete' button is highlighted with a red box and a red arrow. The form contains several input fields for session data.

Date of Session *	0 to 4	Male	Multi Race
10/18/2001		17	3
Hours Given	5 to 11	Female	Other
		8	2
Total Served	12 to 14	Total Gender	Black
25	10	25	5
	15 to 17		White
	10		5
	18 to 20		Islander Asian
	5		5
	21 to 24		Native
			5
	25 to 44		Hispanic
	45 to 64		Total Race
			25
	Over 65		
	Total Age		
	25		

4. Do use the **UNDO** button to erase data from the screen without saving it.

Sessions

[Save](#)
[Undo](#)
[Delete](#)
[Insert](#)
[Attendance](#)
[Return](#)

Date of Session *
 0 to 4
 Male
 Multi Race

Hours Given
 5 to 11
 Female
 Other

Total Served 25
 12 to 14
 Total Gender 25
 Black

15 to 17
 White

18 to 20
 Islander Asian

21 to 24
 Native

25 to 44
 Hispanic

45 to 64
 Total Race 25

Over 65

Total Age 25

5. Do use the **RETURN** Button in order to go back to the previous screen.

Sessions

[Save](#)
[Undo](#)
[Delete](#)
[Insert](#)
[Attendance](#)
[Return](#)

Date of Session *
 0 to 4
 Male
 Multi Race

Hours Given
 5 to 11
 Female
 Other

Total Served 25
 12 to 14
 Total Gender 25
 Black

15 to 17
 White

18 to 20
 Islander Asian

21 to 24
 Native

25 to 44
 Hispanic

45 to 64
 Total Race 25

Over 65

Total Age 25

6. **Do Not** use the **BACK** button located on your browser to return to a previous screen.

DSA Home - Microsoft Internet Explorer

File Edit View Favorites Tools Help

[Back](#)
[Forward](#)
[Stop](#)
[Home](#)
[Search](#)
[Favorites](#)
[History](#)

Address

[utah.gov](#)
[State Online Services](#)
[Agency List](#)

7. Do use the **Offices** button to travel directly from the Sessions, Clients, or Attendance screens back to the Satellite Offices screen.

Session Maintenance [Offices](#)

<< < > >> [Return](#) [Cancel](#)

Service [New API](#) Office [Box Elder Main Office](#) Target Pop [Alcohol and Other Drug Using Adults](#)
 Other Desc. [Clients](#) Location [Even Newer location](#)

	Date of Session	Number of Sessions	Dup Count	Single Count	Hours Given	Total Served
<input checked="" type="radio"/>	11/22/2001					1
<input type="radio"/>	11/28/2001					0

<< < > >> From 1 to 2 Total: 2 [Maintain Session](#) [Add New Session](#) [Attendance](#)

8. Do use the **Find** button to search for an item based upon the criteria contained in the search fields located on the screen.

Service Maintenance

<< < > >>

Office Name [Bever](#) Office Type [Satellite Office](#) Telephone Number

Services **Activities**

[Find](#) [Clear](#)

API Service Name

Other Description

Fiscal Year

Fiscal Quarter

	API Service Name	Other Description	IOM Class
<input checked="" type="radio"/>	Adult DUI Education	Adult DUI Education	Indicated Services
<input type="radio"/>	Free The Horses	Free the Horses	Universal Services

<< < > >> From 1 to 2 Total: 2 [Demographics](#) [Maintain Service](#) [Add New Service](#) [Clients](#) [Sessions](#)

Section VII: How To Use PATS At A Glance

PATS is designed to collect information about three kinds of services/programs, They are:

Sub-Section A: Services which have no client data and only one session.

Sub-Section B: Services which require client specific data and multiple sessions.

Sub-Section C: Services which require no client data but do require multiple sessions.

In addition to collecting data about the three kinds of services/programs, PATS also allows the user to:

Sub-Section D: Add a Location.

Sub-Section E: Add and/or modify Activities (Process Data).

The instructions for this section are designed to give the user a quick, condensed review of each step required to complete the data entry process for each item listed above.

Sub-Section A:

Items A1 through A4 describe the processes for how services/ programs which have no client data and do not require more than one session are entered, saved, and modified in PATS.

A1. Add a new service which collects no client data and does not have multiple sessions

Satellite Offices

Find [Clear](#)

Office Name

<u>Office Name</u>	<u>Telephone Number</u>
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	East 600 South
<input type="radio"/> Kane	310 South 100 East #1
<input type="radio"/> Tooele	100 South 1000 West
<input type="radio"/> Washington	354 East 600 South #202

<< < > >> From 1 to 9 Total: 9 [Services and Activities](#)

1. If applicable, select the office which delivered the service/ program.

2. Click on the **Services and Activities** button

Office Name **Beaver** Office Type **Satellite Office** Telephone Number

Services Activities

[Find](#) [Clear](#)

API Service Name

Other Description

Fiscal Year

Fiscal Quarter

<u>API Service Name</u>	<u>Other Description</u>	<u>IOM Class</u>
<input checked="" type="radio"/> Adult DUI Education	Adult DUI Education	Indicated Services
<input type="radio"/> Free The Horses	Free the Horses	Universal Services

From 1 to 2 Total: 2 [Demographics](#) [Maintain Service](#) [Add New Service](#) [Clients](#) [Sessions](#)

3. Click the Services tab.

4. Click on the Add New Service button

4. Click on the Add New Service button

[Save](#) [Undo](#) [Delete](#) [Insert](#) [Maintain Clients](#) [Sessions](#) [Demographics](#) [Return](#) [Cancel](#)

API Service Name	Anger Management Program	★	Comments	a; laskdjf; alskdjfa; laskdjfl; askd j; laskdjf; laskdjf; laskdjf; las kdjf; laskdjf; laskdjf; laskdjf; l askdjf; laskdjf; laskdjf; laskdjf
Other Description	Anger and You		Multiple Sessions	true
Community	<input type="checkbox"/>	Clients	false	
Family	<input checked="" type="checkbox"/>	Fiscal Quarter	1	
Peer	<input type="checkbox"/>	Fiscal Year	2003	
School	<input type="checkbox"/>	Process Payment	Yes - process for payment	
IOM Class	Universal Services	Service Counter	255	
Complete	<input type="checkbox"/>	Monitoring Days	4	
Start Date *	08/01/2002	Changed Date	08/11/2002	
Units Given		Changed By	geni	
Planned Hours		Added Date	08/05/2003	
Location	Provo Library	Added By	genichol	
Target Pop Name	Adult Drug Court			
Risk Name	Already using substances			

5. Select an API Service Name, the Start Date, and the Location.

6. Then click on the Save button.

6. Then click on the **Save** button.

Required Data On The “Service Information” Screen:

- **Select an API Service Name** (the name of the desired Area Plan Program previously set in PCAPI).
- **Select a Start Date** (The date program started).
- **Select a Location** (the specific place where the program/service was delivered).

Optional Data On The “Service Information” Screen:

- **Other Description** (a unique label that the user can utilize to identify this specific instance/delivery of the service).
- **Complete** (the designation that the program/service is finished, completely delivered, etc.).
- **Units Given** (the number of items that were disseminated [i.e. pamphlets, handouts, trinkets, etc.] during the course of the program/service).
- **Planned Hours** (the number of planning hours that were invested into the program. *[Note: This field should only be utilized if the user does not want to keep track of their planning, preparation, etc., time with the Activity section of PATS]*).
- **Comments** (any additional information that is relevant to the delivery of the program/service in general).
- **Process Payment** (If the program/service is billable, then the user can choose to *ENABLE* or *DISABLE* the billable functionality. This field only impacts programs/services that are originally set up for Billing via PCAPI).
 - If **“Yes-Process For Payment”** is selected, then the billing process **Will** take place for the program/service if it was originally setup to process Billing via PCAPI.
 - If **“No-Do Not Process For Payment”** is selected, then the billing process **WILL NOT** take place for the program/service if it was originally setup to handle Billing via PCAPI.
 - If the program/service **WAS NOT** originally setup to process Billing via PCAPI, then the value of this field is irrelevant and should be ignored.

Demographics

API Service Name	Adult DUI Education	0 to 4	<input type="text" value="0"/>	Males	<input type="text" value="0"/>	White	<input type="text" value="0"/>
Other Description	Adult DUI Education	5 to 11	<input type="text" value="0"/>	Females	<input type="text" value="0"/>	Black	<input type="text" value="0"/>
Start Date	03/05/2002	12 to 14	<input type="text" value="0"/>	Total Gender	0	Hispanic	<input type="text" value="0"/>
General Count	<input type="text" value="0"/>	15 to 17	<input type="text" value="0"/>			Islander/Asian	<input type="text" value="0"/>
Total Count	0	18 to 20	<input type="text" value="0"/>			Native American	<input type="text" value="0"/>
		21 to 24	<input type="text" value="0"/>			Multiple Race	<input type="text" value="0"/>
		25 to 44	<input type="text" value="0"/>			Other	<input type="text" value="0"/>
		45 to 64	<input type="text" value="0"/>			Total Race	0
		65 and Over	<input type="text" value="0"/>				
		Total Age	0				

OK Cancel

7. Fill in the appropriate demographics.

8. Then click on the OK button.

Required Data On The “Demographics” Screen:

- **Age, Gender, & Ethnicity Columns:** (the number of people served by the program/service who can be counted by the age, gender, and ethnicity categories as identified on the screen).
- **General Count:** (the number of people served by the program/service who are not capable of being counted by their demographic information because their volume is too great to make counting their demographics feasible).

Business Rule:

[Under usual circumstances, a program that is set up to use this screen via PCAPI will not utilize both the **General Count** field and the **Age, Gender, & Ethnicity** fields together. The **Total Count** field adds the values from the **General Count** and **Demographic Total** together. Thus, the two means for counting people should only be used together when a service/program serves both a group of people who can be counted with demographic information and a group who is large in number that they cannot.]

Session Maintenance

<< < > >> Save Undo Delete Insert Attendance Demographics Clients

Date of Session

Total Demographics 0

Attended

Hours

Units

Comments

9. Fill in the # of **Hours**.

10. Click on the **Save** button.

Required Data On The “Session Maintenance” Screen:

- **Hours** (the number of hours that transpired while the session was in progress)

Optional Data On The “Session Maintenance” Screen:

- **Units** (the number of pamphlets, handouts, or other items that were given out as a part of the session)
- **Comments** (any additional details, comments, or other information that is relevant to the session)

Business Rule:

[An API that is marked as not requiring “clients” and “multiple sessions” will automatically have the **Date of Session** and **Attendance** fields pre-filled based upon the Service’s start date and the total value of the demographics entered on the Demographics screen.]

A2. Modify An Existing Service/Program which collects no client data or has multiple sessions

Satellite Offices

[Find](#) [Clear](#)

Office Name

Office Name	Telephone Number
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	East 600 South
<input type="radio"/> Kane	310 South 100 East #1
<input type="radio"/> Tooele	100 South 1000 West
<input type="radio"/> Washington	354 East 600 South #202

<< < > >> From 1 to 9 Total: 9 [Services and Activities](#)

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Service Maintenance

<< < > >>

Office Name **Beaver**

Office Type **Satellite Office**

Telephone No

Services

Activities

Find Clear

API Service Name

Other Description

Fiscal Year

Fiscal Quarter

API Service Name	Other Description	IOM Class
<input checked="" type="radio"/> Adult DUI Education	Adult DUI Education	Indicated Services
<input type="radio"/> Free The Horses	Free the Horses	Universal Services

<< < > >> From 1 to 2 Total: 2 [Demographics](#) [Maintain Service](#) [Add New Service](#) [Clients](#) [Sessions](#)

3. Click the **Services** tab.

4. Search for the service/
program which needs to
be change.

5. Click on the button
next to the service's/
program's name.

6. Click on the **Maintain
Service** button.

Service Information

[Add New Location](#)

<< < > >>

[Save](#) [Undo](#) [Delete](#) [Insert](#) [Maintain Clients](#) [Sessions](#) [Demographics](#)

[Return](#) [Cancel](#)

API Service Name **Adult DUI Education**

Location **Beaver Senior High**

Other Description **Adult DUI Education**

Target Pop Name **Elementary Age Youth**

Community ☒

Comments

Family ☐

Peer ☐

School ☐

IOM Class **Indicated Services**

Multiple Sessions **true**

Complete ☐

Clients **false**

Start Date * **03/05/2002**

Fiscal Quarter **3**

Units Given

Fiscal Year **2002**

Planned Hours

7. Make the
necessary changes.

8. Then click on
the **Save** button.

Risk

Protective

Risk Code

Risk

No records

<< < > >> [Delete](#) [Insert](#) From 0 to 1 Total: 0

A3. Modify the Demographics for an existing service/program which collects no client data or has multiple sessions

Satellite Offices

[Find](#) [Clear](#)

Office Name

Office Name	Telephone Number
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	East 600 South
<input type="radio"/> Kane	310 South 100 East #1
<input type="radio"/> Tooele	100 South 1000 West
<input type="radio"/> Washington	354 East 600 South #202

<< < > >> From 1 to 9 Total: 9 [Services and Activities](#)

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Service Maintenance

Office Name **Beaver** Office Type **Satellite Office** Telephone Number

Services Activities

Find Clear

API Service Name
Other Description
Fiscal Year
Fiscal Quarter

API Service Name	Other Description	Service Class
<input checked="" type="radio"/> Adult DUI Education	Adult DUI Education	Indicated Services
<input type="radio"/> Free The Horses	Free the Horses	Universal Services

From 1 to 2 Total 2 **Demographics** Maintain Service Add New Service Clients Sessions

3. Click the **Services** tab.

4. Search for the desired service/program. Then click on its radio button.

5. Click on the **Demographics** button.

Demographics

API Service Name	Adult DUI Education	0 to 4	<input type="text" value="0"/>	Males	<input type="text" value="0"/>	White	<input type="text" value="0"/>
Other Description	Adult DUI Education	5 to 11	<input type="text" value="0"/>	Females	<input type="text" value="0"/>	Black	<input type="text" value="0"/>
Start Date	03/05/2002	12 to 14	<input type="text" value="0"/>	Total Gender	0	Hispanic	<input type="text" value="0"/>
General Count	<input type="text" value="0"/>	15 to 17	<input type="text" value="0"/>			Islander/Asian	<input type="text" value="0"/>
Total Count	0	18 to 20	<input type="text" value="0"/>			Native American	<input type="text" value="0"/>
		21 to 24	<input type="text" value="0"/>			Multiple Race	<input type="text" value="0"/>
		25 to 44	<input type="text" value="0"/>			Other	<input type="text" value="0"/>
		45 to 64	<input type="text" value="0"/>			Total Race	0
		65 and Over	<input type="text" value="0"/>				
		Total Age	0				

6. Make the appropriate changes.

7. Then click on the **OK** button.

A4. Modify the single session of an existing service/program which collects no client data or has multiple sessions

Satellite Offices

[Find](#) [Clear](#)

Office Name

Office Name	Telephone Number
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	East 600 South
<input type="radio"/> Kane	310 South 100 East #1
<input type="radio"/> Tooele	100 South 1000 West
<input type="radio"/> Washington	354 East 600 South #202

<< < > >> From 1 to 9 Total: 9 [Services and Activities](#)

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Service Maintenance

<< < > >>

Office Name [Beaver](#) Office Type [Satellite Office](#) Telephone Number

Services Activities

[Find](#) [Clear](#)

API Service Name

Other Description

Fiscal Year

Fiscal Quarter

API Service Name	Other Desc
<input checked="" type="radio"/> Adult DUI Education	Adult DUI E
<input type="radio"/> Free The Horses	Free the Ho

<< < > >> From 1 to 2 Total: 2 [Demog](#)

[New Service](#) [Sessions](#)

3. Click the **Services** tab.

4. Search for the name of the service/ program. Then click on its radio button.

5. Click on the **Sessions** button

Session Maintenance

<< < > >>

Service [Adult DUI Education](#) Office [Beaver](#) Target Pop [Elementary Age Youth](#)

Other Desc. [Adult DUI Education](#) Location [Beaver Senior High](#) Total Demographics 0

	Date of Session	Attended
<input checked="" type="radio"/>	03/06/2002	

<< < > >> From 1 to 1 Total: 1 [Maintain Session](#) [Add New Session](#) [Attendance](#) [Demographics](#)

6. Search for the session which needs to be changed. Then click on its radio button.

7. Select the session and then click on the **Maintain Session** button.

Session Maintenance

<< < > >> **Save** Undo Delete Insert Attendance Demographics Clients

Date of Session

Total Demographics 0

Attended

Hours

Units

Comments

8. Make the necessary changes.

9. Then click on the **Save** button.

Sub Section B:

Items B1 through B3 describe how services/programs that require client information and more than one session are entered, saved, and modified.

B1. Add a new service which collects client data and has multiple sessions

Satellite Offices

Find [Clear](#)

Office Name

<u>Office Name</u>	<u>Telephone Number</u>
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	East 600 South
<input type="radio"/> Kane	310 South 100 East #1
<input type="radio"/> Tooele	100 South 1000 West
<input type="radio"/> Washington	354 East 600 South #202

<< < > >> From 1 to 9 Total: 9 [Services and Activities](#)

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Office Name **Beaver** Office Type **Satellite Office** Telephone Number

Services Activities

Find [Clear](#)

API Service Name

Other Description

Fiscal Year

Fiscal Quarter

<u>API Service Name</u>	<u>Other Description</u>	<u>IOM Class</u>
<input checked="" type="radio"/> Adult DUI Education	Adult DUI Education	Indicated Services
<input type="radio"/> Free The Horses	Free the Horses	Universal Services

From 1 to 2 Total: 2 [Demographics](#) [Maintain Service](#) [Add New Service](#) [Clients](#) [Sessions](#)

3. Click the Services tab.

4. Click on the Add New Service button

4. Click on the Add New Service button

<< < > >> Save Undo Delete Insert Maintain Clients Sessions Demographics Return Cancel

API Service Name	Anger Management Program	Comments	a;laskdjf;alskdjfa;laskdjfl;askd jf;laskdjf;laskdjf;laskdjf;lask kdjf;laskdjf;laskdjf;laskdjf;l askdjf;laskdjf;laskdjf;laskdjf
Other Description	Anger and You		
Community	<input type="checkbox"/>	Multiple Sessions	true
Family	<input checked="" type="checkbox"/>	Clients	false
Peer	<input type="checkbox"/>	Fiscal Quarter	1
School	<input type="checkbox"/>	Fiscal Year	2003
IOM Class	Universal Services	Process Payment	Yes - process for payment
Complete	<input type="checkbox"/>	Service Counter	255
Start Date *	08/01/2002	Monitoring Days	4
Units Given		Changed Date	10/11/2002
Planned Hours		Changed By	genichol
Location	Provo Library	Added Date	08/05/2002
Target Pop Name	Adult Drug Court	Added By	geni
Risk Name	Already using substances		

Risk Protective

Risk Code	Risk Factor
RS03	Academic Failure
RP02	Attitudes Favorable to Alcohol, Tobacco & Other Dr

<< < > >> Delete Insert From 1 to 2 Total: 2

6. Then click on the **Save** button.

Client Maintenance

<< < > >>

Service BR DUI Program 340 Office Cache Location C

Find Clear

Last Name

Last Name	First Name	Middle Initial	Client ID	Age
<input type="radio"/>				6
<input type="radio"/>				25

<< < > >> From 1 to 2 Total: 2 Maintain Client Add New Client Attendance Demographics

7. Click on the **Add New Client** button.

Client Maintenance

<< < > >> Save Undo Delete Insert Attendance Sessions

Client ID

Last Name

First Name

Middle Initial

Age

Birth Date - MM/DD/YYYY

Gender *

Ethnicity *

Social Security Number

Driver Licence

Required Data on the “Client Maintenance” Screen

- **Age or Birth Date** (either enter the age of the client or enter their birth date)
- **Gender** (select the gender of the client)
- **Ethnicity** (select the ethnicity of the client)

Optional Data on the “Client Maintenance” Screen

- **Client ID** (an identifying number manufactured by the user/Local Authority)
- **First Name** (the client’s first name)
- **Last Name** (the client’s last name)
- **Middle Initial** (the client’s middle initial)
- **Social Security Number** (the client’s social security number)
- **Driver’s License Number** (the client’s driver’s license number)

Session Maintenance

<< < > >>

Service	Adult DUI Education	Office	Beaver	Target	Elementary Age Youth
Other Desc.	Adult DUI Education	Location	Beaver Senior High	Total	graphics 0

Date of Session	Attended
03/06/2002	

<< < > >> From 1 to 1 Total: 1 [Maintain Session](#) [Add New Session](#) [Attendance](#) [Demographics](#)

11. Click on the **Add New Session** button.

Session Maintenance

<< < > >> [Save](#) [Undo](#) [Delete](#) [Insert](#) [Attendance](#) [Demographics](#) [Clients](#)

Date of Session *

Total Demographics 0

Attended

Hours

Units

Comments

12. Enter the appropriate information.

13. Click the **Save** button.

14. Click the **Attendance** button.

Attendance

Service BR DUI Program 340
Other Desc. DUI Education Program

Date of

15. Click the **check box** which corresponds to each client that attended the session.

Last Name	First Name	Birth Da	Attended
Imma	Wonda		<input checked="" type="checkbox"/>
Mann	Silly		<input checked="" type="checkbox"/>
Randolf	Bobby		<input type="checkbox"/>
<< < > >> From 1 to 3 Total: 3			

16. After the attendance has been taken, click the **OK** button.

[OK](#) [Cancel](#)

B2. Add a new session to an existing service/program which collects client data and has multiple sessions

Satellite Offices

[Find](#) [Clear](#)

Office Name

Office Name	Telephone Number
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	
<input type="radio"/> Kane	
<input type="radio"/> Tooele	
<input type="radio"/> Washington	

<< < > >> From 1 to 9 Total: 9 [Services and Activities](#)

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Service Maintenance

<< < > >>

Office Name **Beaver**

Office Type **Satellite Office**

Tel

Services

Activities

Find Clear

API Service Name

Other Description

Fiscal Year

Fiscal Quarter

API Service Name

Other Description

IOM Class

☒ Adult DUI Education

Adult DUI Education

Indicated Services

☐ Free The Horses

Free the Horses

Universal Services

<< < > >>

From 1 to 2 Total: 2

[Demographics](#)

[Maintain Service](#)

[Add New Service](#)

[Clients](#)

[Sessions](#)

3. Click the **Services** tab.

4. Search for the service/program which needs to have a session added to it. Then click on the radio button next to the service/program to select it.

5. Click on the **Sessions** button.

Session Maintenance

<< < > >>

Service **Adult DUI Education**

Office **Beaver**

Target

Elementary Age Youth

Other Desc. **Adult DUI Education**

Location **Beaver Senior High**

Total

graphics 0

Date of Session

Attended

☒

03/06/2002

<< < > >>

From 1 to 1 Total: 1

[Maintain Session](#)

[Add New Session](#)

[Attendance](#)

[Demographics](#)

6. Click on the **Add New Session** button.

Session Maintenance

<< < > >> **Save** Undo Delete Insert Attendance Demographics Clients

Date of Session

Total Demographics 0

Attended

Hours

Units

Comments

7. Enter the appropriate information.

8. Click the **Save** button.

9. Click the **Attendance** button.

Attendance

Service BR DUI Program 340
Other Desc. DUI Education Program

Date of

Last Name	First Name	Birth Da	Attended
Imma	Wonda		<input checked="" type="checkbox"/>
Mann	Silly		<input checked="" type="checkbox"/>
Randolf	Bobby		<input type="checkbox"/>

<< < > >> From 1 to 3 Total: 3

10. Click the **check box** which corresponds to each client that attended the session.

11. After the attendance has been taken, click the **OK** button.

OK Cancel

B3. Modify a client's session attendance

Satellite Offices

[Find](#) [Clear](#)

Office Name

Office Name	Telephone Number
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	East 600 South
<input type="radio"/> Kane	310 South 100 East #1
<input type="radio"/> Tooele	100 South 1000 West
<input type="radio"/> Washington	354 East 600 South #202
<< < > >> From 1 to 9 Total: 9 Services and Activities	

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Service Maintenance

<< < > >>

Office Name **Beaver**

Office Type **Satellite Office**

Tel

Services

Activities

Find Clear

API Service Name

Other Description

Fiscal Year

Fiscal Quarter

API Service Name

Other Description

IOM Class

☒ Adult DUI Education

Adult DUI Education

Indicated Services

☐ Free The Horses

Free the Horses

Universal Services

<< < > >>

From 1 to 2 Total: 2

[Demographics](#)

[Maintain Service](#)

[Add New Service](#)

[Clients](#)

[Sessions](#)

3. Click the **Services** tab.

4. Search for the service/program which has the client(s) that needs to be modified. Then click on the radio button next to the service/program to select it.

5. Click on the **Clients** button.

Client Maintenance

<< < > >>

Service **BR DUI Program 340**

Office **Cache**

Find Clear

Last Name

Last Name

First Name

Middle Initial

Client

Age

☒

6

☐

25

<< < > >>

From 1 to 2 Total: 2

[Maintain Client](#)

[Add New Client](#)

[Attendance](#)

[Demographics](#)

6. Search for the client that needs to be modified. Then click on the radio button next to the client in order to select her.

7. Click on the **Attendance** button.

Attendance

Service BR DUI Program 340
Other Desc. DUI Education Program

Last Name	First Name	Attended
Imma	Wonda	<input checked="" type="checkbox"/>
Mann	Silly	<input checked="" type="checkbox"/>
Randolf	Bobby	<input type="checkbox"/>

<< < > >> From 1 to 3 Total

8. Click the **check box(s)** which corresponds to each session the client attended.

9. After the attendance has been modified, click the **Save** button.

Sub-Section C:

Items C1 through C4 describe how services/programs that require more than one session, but to not require client data, are entered, saved, and modified.

C1. Add a new service which has multiple sessions but does not collect client data

Satellite Offices

Find [Clear](#)

Office Name

<u>Office Name</u>	<u>Telephone Number</u>
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	East 600 South
<input type="radio"/> Kane	310 South 100 East #1
<input type="radio"/> Tooele	100 South 1000 West
<input type="radio"/> Washington	354 East 600 South #202

<< < > >> From 1 to 9 Total: 9 [Services and Activities](#)

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Service Maintenance

<< < > >>

Office Name **Beaver** Office Type **Satellite Office** Telephone Number

Services Activities

Find Clear

API Service Name

Other Description

Fiscal Year

Fiscal Quarter

API Service Name	Other Description	IOM Class
<input checked="" type="radio"/> Adult DUI Education	Adult DUI Education	Indicated Services
<input type="radio"/> Free The Horses	Free the Horses	Universal Services

<< < > >> From 1 to 2 Total: 2 [Demographics](#) [Maintain Service](#) **Add New Service** [Clients](#) [Sessions](#)

3. Click the **Services** tab.

4. Click on the **Add New Service** button

Service Information

[Add New Location](#)

<< < > >> **Save** [Undo](#) [Delete](#) [Insert](#) [Maintain Clients](#) [Sessions](#) [Demographics](#) [Return](#) [Cancel](#)

API Service Name **Anger Management Program** Comments

Other Description **Anger and You**

Community ☐

Family ☒

Peer ☐

School ☐

IOM Class **Universal Services**

Complete ☐

Start Date * **08/01/2002**

Units Given

Planned Hours

Location **Provo Library**

Target Pop Name **Adult Drug Court**

Risk Name **Already using substances**

Multiple Sessions **true**

Clients **false**

Fiscal Quarter **1**

Fiscal Year **2003**

Process Payment **Yes - process for payment**

Service Counter **255**

Monitoring Days **4**

Changed Date **10/11/2002**

Changed By **genichol**

Added Date **08/05/2002**

Added By

Risk **Protective**

Risk Code	Risk Factor
<input checked="" type="radio"/> RS03	Academic Failure
<input type="radio"/> RP02	Attitudes Favorable to Alcohol, Tobacco & Other Dr

<< < > >> [Delete](#) [Insert](#) From 1 to 2 Total: 2

5. Select an **API Service Name**, the **Start Date**, and the **Location**.

6. Then click on the **Save** button.

Demographics

API Service Name	Adult DUI Education	0 to 4	<input type="text" value="0"/>	Males	<input type="text" value="0"/>	White	<input type="text" value="0"/>
Other Description	Adult DUI Education	5 to 11	<input type="text" value="0"/>	Females	<input type="text" value="0"/>	Black	<input type="text" value="0"/>
Start Date	03/05/2002	12 to 14	<input type="text" value="0"/>	Total Gender	0	Hispanic	<input type="text" value="0"/>
General Count	<input type="text" value="0"/>	15 to 17	<input type="text" value="0"/>			Islander/Asian	<input type="text" value="0"/>
Total Count	0	18 to 20	<input type="text" value="0"/>			Native American	<input type="text" value="0"/>
		21 to 24	<input type="text" value="0"/>			Multiple Race	<input type="text" value="0"/>
		25 to 44	<input type="text" value="0"/>			Other	<input type="text" value="0"/>
		45 to 64	<input type="text" value="0"/>			Total Race	0
		65 and Over	<input type="text" value="0"/>				
		Total Age	0				

OK Cancel

7. Fill in the appropriate demographics.

8. Then click on the **OK** button.

Session Maintenance

<< < > >> **Save** Undo Delete Insert Attendance Demographics Clients

Date of Session	<input type="text"/>
Total Demographics	0
Attended	<input type="text"/>
Hours	<input type="text"/>
Units	<input type="text"/>
Comments	<input type="text"/>

11. Add the necessary information

12. Click on the **Save** button.

Required Data On The “Session Maintenance” Screen:

- **Date of Session** (the date the session occurred on)
- **Attended** (the number of people who attended the session)
- **Hours** (the number of hours that transpired while the session was in progress)

Optional Data On The “Session Maintenance” Screen:

- **Units** *(the number of pamphlets, handouts, or other items that were given out as a part of the session)*
- **Comments** *(any additional details, comments, or other information that is relevant to the session)*

C2. Add a new session to an existing service/program which has multiple sessions but does not collect client data

Satellite Offices

[Find](#) [Clear](#)

Office Name

Office Name	Telephone Number
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	
<input type="radio"/> Kane	
<input type="radio"/> Tooele	
<input type="radio"/> Washington	

<< < > >> From 1 to 9 Total: 9 [Services and Activities](#)

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Service Maintenance

<< < > >>

Office Name **Beaver**

Office Type **Satellite Office**

Tele

Services

Activities

Find Clear

API Service Name

Other Description

Fiscal Year

Fiscal Quarter

API Service Name	Other Description	IOM Class
<input checked="" type="radio"/> Adult DUI Education	Adult DUI Education	Indicated Services
<input type="radio"/> Free The Horses	Free the Horses	Universal Services

<< < > >> From 1 to 2 Total: 2 [Demographics](#) [Maintain Service](#) [Add New Service](#) [Clients](#) [Sessions](#)

3. Click the **Services** tab.

4. Search for the name of the service/program which needs to have the session added to it. Then click on the radio button next to the service/program in order to select it.

5. Click on the **Session** button.

Session Maintenance

<< < > >>

Service **Adult DUI Education**

Office **Beaver**

Target

Elementary Age Youth

Other Desc. **Adult DUI Education**

Location **Beaver Senior High**

Total

graphics 0

	<u>Date of Session</u>	<u>Attended</u>
<input checked="" type="radio"/>	03/06/2003	

<< < > >> From 1 to 1 Total: 1 [Maintain Session](#) [Add New Session](#) [Attendance](#) [Demographics](#)

6. Click on the **Add New Sessions** button.

Session Maintenance

<< < > >>

Save Undo Delete Insert Attendance Demographics Clients

Date of Session



Total Demographics 0

Attended

Hours

Units

Comments

7. Add the necessary information

8. Click on the **Save** button.

C3. Modify a session for an existing service/program which has multiple sessions but does not collect client data

Satellite Offices

[Find](#) [Clear](#)

Office Name

Office Name	Telephone Number
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	East 600 South
<input type="radio"/> Kane	310 South 100 East #1
<input type="radio"/> Tooele	100 South 1000 West
<input type="radio"/> Washington	354 East 600 South #202

<< < > >> From 1 to 9 Total: 9 [Services and Activities](#)

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Service Maintenance

<< < > >>

Office Name [Beaver](#) Office Type [Satellite](#)

Services Activities

[Find](#) [Clear](#)

API Service Name

Other Description

Fiscal Year

Fiscal Quarter

API Service Name	Other Description
<input checked="" type="radio"/> Adult DUI Education	Adult DUI Education
<input type="radio"/> Free The Horses	Free the Horses
<input type="radio"/> Universal Service	Universal Service

<< < > >> From 1 to 2 Total: 2 [Demographics](#) [Maintain Service](#) [Add New Service](#) [Client Sessions](#)

3. Click the **Services** tab.

4. Search for the name of the service/ program. Then click on the radio button next the name of the service/program in order to select it.

5. Click on the **Sessions** button

Session Maintenance

<< < > >>

Service [Adult DUI Education](#) Office [Beaver](#) Target Pop [Elementary Age Youth](#)

Other Desc. [Adult DUI Education](#) Location [Beaver Senior High](#) Total Demographics [0](#)

	Date of Session	Attended
<input checked="" type="radio"/>	03/06/2002	

<< < > >> From 1 to 1 Total: 1 [Maintain Session](#) [Add New Session](#) [Attendance](#) [Demographics](#)

6. Search for the session which needs to be changed. Then click on the radio button next to the session in order to select it.

7. Click on the **Maintain Session** button.

Session Maintenance

<< < > >> **Save** Undo Delete Insert Attendance Demographics Clients

Date of Session

Total Demographics 0

Attended

Hours

Units

Comments

8. Make the necessary changes.

9. Then click on the **Save** button.

C4. Modify the demographics for a service/program which has multiple sessions but does not collect client data

Satellite Offices

[Find](#) [Clear](#)

Office Name

Office Name	Telephone Number
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	East 600 South
<input type="radio"/> Kane	310 South 100 East #1
<input type="radio"/> Tooele	100 South 1000 West
<input type="radio"/> Washington	354 East 600 South #202

<< < > >> From 1 to 9 Total: 9 [Services and Activities](#)

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Service Maintenance

Office Name **Beaver** Office Type **Satellite Office** Telephone

Services Activities

Find Clear

API Service Name
Other Description
Fiscal Year
Fiscal Quarter

☒ Adult DUI Education
☐ Free The Horses

Adult DUI Education
Free the Horses

Indicated Services
Universal Services

From 1 to 2 Total 2 **Demographics** Maintain Service Add New Service Clients Sessions

3. Click the **Services** tab.

4. Search for the desired service/ program. Then click on the radio button next to the service/program in order to select it.

5. Click on the **Demographics** button.

Demographics

API Service Name Adult DUI Education
Other Description Adult DUI Education
Start Date 03/05/2002
General Count 0
Total Count 0

0 to 4
5 to 11
12 to 14
15 to 17
18 to 20
21 to 24
25 to 44
45 to 64
65 and Over
Total Age 0

Males
Females
Total Gender 0

White
Black
Hispanic
Islander/Asian
Native American
Multiple Race
Other
Total Race 0

OK Cancel

6. Make the appropriate changes.
7. Then click on the **OK** button.

Sub-Section D:

Items D1 & D2 describe how to add a new location and how to modify it.

D1. Add a new Location for any service/program

Satellite Offices

[Find](#) [Clear](#)

Office Name

<u>Office Name</u>	<u>Telephone Number</u>
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	East 600 South
<input type="radio"/> Kane	310 South 100 East #1
<input type="radio"/> Tooele	100 South 1000 West
<input type="radio"/> Washington	354 East 600 South #202

<< < > >> From 1 to 9 Total: 9 [Services and Activities](#)

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Service Maintenance

Office Name [Alpine School District](#) Office Type [Satellite Office](#)

Services **Activities**

[Find](#) [Clear](#)

API Service Name

Other Description

Fiscal Year

Fiscal Quarter

Service Counter

API Service Name	Other Description	Service Counter	IOM Class	Start Date	Fiscal Quarter	Fiscal Year
<input checked="" type="radio"/> Anger Management Program	Anger and You	255	Universal Services	08/01/2002	1	2003
<input type="radio"/> Anger Management Program	Anger and You	259	Universal Services	08/06/2002	1	2003
<input type="radio"/> Anger Management Program	Anger and You and Me	276	Universal Services	08/05/2002	1	2003
<input type="radio"/> Anger Management Program	Anger and You Test	277	Universal Services	08/06/2002	1	2003

From 1 to 4 Total: 4 [Maintain Service](#) [Add New Service](#) [Clients](#) [Sessions](#) [Demographics](#)

3. Click on the **Add New Location** button.

4. Fill in the desired information.

5. Click on the **Save** button.

6. Click on the **Return** button.

Locations

[Save](#) [Undo](#) [Delete](#) [Insert](#)

Location Name *

Education Level *

Area Name

[Return](#) [Cancel](#)

Required Data on the "Locations" Screen

- **Location Name** (the name of the exact location where the service/program is delivered)
- **Education Level** (the level of education that is consistently served at the location - i.e. elementary school children, high school children, etc. **[NOTE: if no school level is consistently served at the location, then select "Other".]**)
- **Area Name** (the name of the Area within which the location resides)

Sub-Section E:

Items E1 and E2 describe how to add and modify an Activity (Process Data)

E1. Add a new Activity

Satellite Offices

[Find](#) [Clear](#)

Office Name

<u>Office Name</u>	<u>Telephone Number</u>
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	East 600 South
<input type="radio"/> Kane	310 South 100 East #1
<input type="radio"/> Tooele	100 South 1000 West
<input type="radio"/> Washington	354 East 600 South #202
<< < > >> From 1 to 9 Total: 9 Services and Activities	

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Service Maintenance

<< < > >>

Office Name **Beaver**

Office Type **Satellite Office**

Telephone Number

Services

Activities

[Find](#) [Clear](#)

API Service Name

Other Description

Category

Description

Fiscal Year

Fiscal Quarter

3. Click on the
Activities tab.

4. Click on the
**Add New
Activity** button

API Service Name

Other Description

Category

Description

No records found!

<< < > >>

From 0 to 1 Total: 0

[Add New Activity](#)

Activity

<< < > >> **Save** Undo Delete Insert

API Service Name

Other Description


Category ▼

Description

Hours

Participants

Units

Date * 

Comments

Fiscal Year

Fiscal Quarter

5. Add the appropriate information.

6. Then click on the **Save** button.

Required Data On The “Activity” Screen

- **API Service Name** (the name of the Area Plan Program which is addressed by the Activity)
- **Category** (the name of the Category which designates what kind of Activity is being done)
- **Hours** (the number of hours which transpired while the Activity was in progress)
- **Participants** (the number of people involved in the Activity)
- **Date** (the date when the Activity took place)

Optional Data On The “Activity” Screen

- **Description** (a description of what the Activity is)
- **Units** (the number of pamphlets, documents, or other items which were given as a part of the Activity)
- **Comments** (additional information, details, etc., regarding the Activity)

E2. Modify an Activity

Satellite Offices

[Find](#) [Clear](#)

Office Name

Office Name	Telephone Number
<input checked="" type="radio"/> Beaver	
<input type="radio"/> Box Elder/Tremonton	
<input type="radio"/> Brigham City	
<input type="radio"/> Cache	
<input type="radio"/> Garfield	
<input type="radio"/> Iron	East 600 South
<input type="radio"/> Kane	310 South 100 East #1
<input type="radio"/> Tooele	100 South 1000 West
<input type="radio"/> Washington	354 East 600 South #202

<< < > >> From 1 to 9 Total: 9 [Services and Activities](#)

1. If applicable, select the office which delivered the service/program.

2. Click on the **Services and Activities** button

Services **Activities**

[Find](#) [Clear](#)

API Service Name

Other Description

Category

Description

Fiscal Year

Fiscal Quarter

<u>API Service Name</u>	<u>Other Description</u>	<u>Category</u>	<u>Description</u>
Teen Anger 2002	Dealing with Teen Anger	Client Meeting	We meet, we talk
Working with Young Mothers	Helping new mothers	Staff Meeting	
Working with Young Mothers	Helping new mothers	Staff Meeting	

[<<](#) [<](#) [>](#) [>>](#) From 1 to 3 Total 3 [Add New Activity](#)

3. Click on the Activities tab.

4. Search for the name of the Activity. Then click on it when it appears.

Activity

<< < > >> **Save** Undo Delete Insert

API Service Name

Other Description

Category

Description

Hours

Participants

Units

Date *

Comments

Fiscal Year

Fiscal Quarter

5. Make appropriate modifications.

6. Then click on the **Save** button.